Since 1941, the Social Security Administration (SSA) has periodically surveyed the aged to determine their economic status. The first national survey was conducted in 1963. In 1976, SSA's Office of Research and Statistics began compiling a biennial series of reports on the income of the aged based on data collected by the Bureau of the Census in its Current Population Survey. These reports are published under the title Income of the Population 55 or Older. The most recent edition contains 1996 data, and is the source, along with special tabulations, for this chartbook.

The unit of analysis here, with the exception of measures of poverty, is the "aged unit" and not the household, the family, or unrelated individuals, as are used by the Bureau of the Census. The aged unit is either a married couple living together with the husband or wife aged 65 or older (generally measured by the age of the husband), or a person 65 or older who does not live with a spouse. The unit of analysis for poverty, as of the 1996 edition of this chartbook, is persons aged 65 or older.

The 1996 sample represented 9,662,000 couples and 14,891,000 single units aged 65 or older. The single person unit may be a widow(er), a divorced or separated person, a legally married person who does not live with a spouse, or a person who never married. This unit of analysis allows one to measure the economic status of the entire noninstitutionalized aged population separately from that of the family or household in which the unit may live.

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